

# Green Investment Firms Recognize Performance Track

Investment research and advisory firms are increasingly considering environmental and social performance as an indicator to evaluate and rate companies. Three leading financial firms, Calvert Group, Innovest Strategic Value Advisors, and KLD Research & Analytics Inc., all use Performance Track data in their research methods. These companies find the Performance Track data to be one effective way to assess a company's value and overall environmental performance.

## Calvert Group, Ltd.—

A Bethesda, MD based company, Calvert provides investment products and information on socially responsible investing to shareholders, financial advisors, institutional investors, and individuals. Calvert has been using Performance Track data for the past couple of years as an indicator of a company's environmental performance and quality of management. The environment is one of seven factors that Calvert uses to determine if a company is eligible for investment in a Calvert mutual fund. Calvert considers a company's decision to participate in Performance Track as a good indicator of its overall corporate environmental management and gives credit to those companies that have enrolled two or more facilities in Performance Track. Calvert uses data from several other EPA voluntary programs to gauge a company's commitment to going beyond compliance.

For more information about Calvert and its products and services, visit [www.calvertgroup.com](http://www.calvertgroup.com).



## Innovest Strategic Value Advisors—

Headquartered in New York, NY, Innovest is an investment research and advisory firm specializing in analyzing companies' performance on environmental, social, and strategic governance issues. Innovest evaluates companies using a Wall Street approach and uses benchmarking to compare companies with their peers. Many of Innovest's clients are money managers that use Innovest's research and grading as a way to incorporate environmental research into their financial investment processes. Innovest evaluates a company's management performance by identifying negative or positive management trends. Innovest has been using Performance Track data since it was originally released. They believe that membership in Performance Track shows that a company is proactive and confident about their environmental management program. Innovest encourages companies to take advantage of Performance Track because it can result in added value, increased profits, reduced risks, new product development, and cost savings.

For more information about Innovest and its services, visit [www.innovestgroup.com](http://www.innovestgroup.com) or contact Marc Brammer, Director of Research at [mbrammer@innovestgroup.com](mailto:mbrammer@innovestgroup.com).



KLD Research & Analytics Inc.—

KLD, located in Boston, MA, is a provider of social research for institutional investors. KLD serves institutional clients who wish to integrate social criteria into their investment decisions. By providing positive and negative ratings on companies, KLD is able to offer investors an idea of how a company performs on social and environmental issues. KLD began using Performance Track in 2001 as part of its research process to categorize companies and to understand how the companies operate.

KLD uses Performance Track data because it provides information about a company's waste reductions, including how those reductions are achieved. Specifically, Performance Track data provides detail about the actual pollution prevention methodologies that a company uses to avoid and reduce waste, which allows KLD to identify genuine pollution prevention versus pollution control or waste shifting. KLD considers corporate participation in Performance Track a positive indicator that a company's Environmental Management System is well implemented. Corporate participation in Performance Track also provides detailed information about how well a company addresses such issues as waste and pollution prevention.

For more information on KLD, visit [www.kld.com](http://www.kld.com) or contact Andrew Brengle, Senior Research Analyst at (617) 426-5270, [abrengle@kld.com](mailto:abrengle@kld.com).